

San Bernardino BHMIS Phase I End User Training Agenda

CalPM ADT - ARMC

Date:	TBD	
Course Instructor:	TBD	
Duration:	1 Day	
Super User Attending:	TBD	
Location:	TBD	
Roles required to complete:	INSERT ROLES HERE	
Objective		
Objective:		
DAY 1 DATE Time: 8:30AM – 4:30PM		
EST. START/END TIME	TOPIC	NOTES
8:30 – 9:00	Avatar Basics Logging In and Out Navigation of Home View My Forms Clients Widget Navigation of Chart View	
9:00 – 10:00	Inpatient Admission Bundle Admission CSI Admission Diagnosis Discharge* MH Registration Bundle Admission (Outpatient) CSI Admission Program Assignment Diagnosis Discharge (Review of MH process) Program Assignment (closing)	*Note for NTST Trainer: speaking to this bundle for context and understanding. Staff may not be the one entering this information into Avatar.
10:00 – 10:15	BREAK	
10:15 – 10:45	Hands on Exercise	
10:45 – 11:30	Financial Bundle Financial Eligibility Fast Financial Eligibility Real Time Inquiry 270 Request	
11:30 – 12:30	LUNCH	

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12:30 – 1:15	Client Update Bundle Update Client Data Financial Eligibility Client Condition Pregnancy Emergency Contact Information	
1:15 – 2:00	Ancillary/Ambulatory Services Client Charge Input Recurring Client Charge Input Edit Service Information Spreadsheet Edit Service Information Delete Service	
2:00 – 2:30	Client Ledger Simple Report Crystal Report	
2:30 – 2:45	BREAK	
2:45 – 3:15	TAR Clinical Review Bundle TAR Clinical Review TAR Administrative	
3:15 – 4:00	Crystal Reports Direct Service Detail Input Verification Client Services Listing (MHS912) Client Face Sheet (MHS140) Errors and Denials Placeholder Advance Billing Rules Failed Compliance Report	
4:00 – 4:30	Hands on Exercise/Wrap Up	

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Specific Training Notes for this Course